(Araştırma)

OMNICHANNEL RETAILING IN TÜRKİYE: A CONTENT ANALYSIS STUDY [1,2]

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ABSTRACT

As the concept of omnichannel marketing is relatively new, retailers have only recently begun to adopt this strategy. Accordingly, existing literature primarily comprises descriptive studies aimed at introducing the concept of omnichannel marketing. Also, research, particularly in Türkiye, predominantly focuses on customer perception. To address this gap, this study aims to reveal the omnichannel applications of Türkiye's largest 100 retailers and to determine the prevalence of these applications by sector. Descriptive statistical techniques were used as the analysis method. According to the results of the analysis, almost half of Türkiye's most prominent retailers have started to implement an omnichannel strategy. The most prevalent omnichannel application is click and collect. In this context, the related study revealed the status of omnichannel marketing practices of Türkiye's largest retailers and has drawn a general structure.

Keywords: Omnichannel, Click and Collect, Content Analysis, Retailing, Digital Marketing

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TÜRKİYE'DE OMNİKANAL PERAKENDECİLİK: BİR İÇERİK ANALİZİ ÇALIŞMASI

ÖZ

Omnikanal pazarlama kavramı nispeten yeni olduğundan perakendeciler bu stratejiyi ancak yakın zamanda benimsemeye başlamıştır. Bu doğrultuda, mevcut literatür omnikanal kavramını tanıtmaya yönelik tanımlayıcı çalışmalardan oluşmaktadır. Ayrıca, özellikle Türkiye'deki araştırmalar ağırlıklı olarak müşteri algısına odaklanmaktadır. Bu açığı kapatmak amacıyla çalışma, Türkiye›nin en büyük 100 perakendecisinin omnikanal uygulamalarını ortaya çıkarmayı ve bu uygulamaların sektörlere göre yaygınlığını belirlemeyi amaçlamaktadır. Analiz yöntemi olarak tanımlayıcı istatistiksel teknikler kullanılmıştır. Analiz sonuçlarına göre Türkiye›nin en büyük perakendecilerinin neredeyse yarısı omnikanal stratejisini uygulamaya başladığı anlaşılmaktadır. En yaygın çok kanallı uygulama tıkla ve topla uygulamasıdır. Bu bağlamda ilgili çalışma Türkiye'nin en büyük perakendecilerinin omnikanal pazarlama uygulamalarının durumunu ortaya koymuş ve genel bir yapı çizmiştir.

Anahtar kelimeler: Omnikanal, Tıkla ve Topla, İçerik Analizi, Perakendecilik, Dijital Pazarlama

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1. Introduction

With the increasing importance of technology in human life day by day, consumer behaviors are changing in line with the innovations brought by digitalization. Digitalization transforms the customers we refer to as today's customers into customers who use physical and online channels together and want an uninterrupted service experience (Yurova et al., 2016). Today's customers want to get information about the product in the most accurate way and as soon as possible (Beck & Rygl, 2015). They prefer to use more than one channel throughout their shopping journey, from the product research process to the pre-purchase, moment of purchase, and post-purchase processes (Weinberg et al., 2007). Therefore, customers want to experience a service experience where they can get a price comparison of a product with a single click, as well as interact with the store staff face-to-face and check the stock status of the product, that is, the physical and online channels are perfectly integrated (Rigby, 2011).

Knowing how customers move through channels by having a unique experience is especially important for retailers to generate more sales, maintain this process, and increase customer loyalty (Luo et al., 2023; Sands et al., 2016). In this context, retailers should provide the opportunity to reach consumers through many channels and to switch between channels easily by providing a smooth experience (Kazancoglu et al., 2017; Marmol & Fernandez, 2019; Picot-Coupey et al., 2016). In this situation, where consumers are bombarded with goods and services by retailers (Grewal et al., 2017) it has become difficult for retailers to build customer loyalty. The omnichannel approach provides retailers the opportunity to satisfy customers who want to take advantage of all the advantages of physical channels, such as face-to-face communication with store personnel, as well as the advantages of online channels such as personalized experience and price transparency (Rigby, 2011).

In Türkiye, there are studies on omnichannel applications and the customer experience in the retail sector (Aytekin & Uzel Aydınocak, 2022; Sayat Aycan, 2017; Yumurtacı Hüseyinoglu, 2017; Telli & Gök, 2019; Öztürk, 2019; Aslan, 2019). Although there were studies that revealed the current situation by conducting in-depth interviews with retailers, it has been understood that these studies are limited to a single sector, limited sample, or research on customer perception (Sayat Aycan, 2017; Öztürk, 2019; Şen, 2020; Kazancoglu et al., 2017; Karacali & Salman, 2020; Kazemzadehazad Kurt & Kırcova, 2023). While an omnichannel marketing strategy creates competitive power for retail companies around the world, companies in Türkiye have just started to implement it. Since Türkiye is a developing country and has a high potential for online commerce, as it is in the Middle East Region, Türkiye is a good study area to be able to see the omnichannel application process. In this direction, the study aims to reveal the omnichannel applications of Türkiye's largest retailers and to present a general perspective on how it is applied according to the sectors.

2. Literature Review

2.1. From Single-Channel Retailing to Omnichannel Retailing

Retailing which includes many sub-sectors such as store retailing, service retailing, and mobile retailers involves all activities of the purchasing process for the individual consumption of a good or service (Filipe & Lima, 2015. Retailing started with a single-channel approach that covers a single channel through which firms can serve their customers and continues to be carried out with a multi-channel approach in line with the trends brought by digitalization. Table 1 provides a comprehensive breakdown of the distinctions between multi-channel, cross-channel, and omnichannel.

Table 1: Omnichannel Process

	Multi-Channel	Cross-Channel	Omnichannel
Goal	Serving through multiple channels	Provide partial integration between channels and provide a consistent customer experience	A personalized and smooth service experience
Concept	Partial integration	Partial integration	Full integration
Focus	Customer	Partial customer brand experience	Overall customer brand experience
Approach	Silo management approach	An interconnected approach	Unified approach
Channels	Store, website, mobile	Store, website, mobile, social media, customer interaction points	Store, website, mobile, social media, customer interaction points
Data	Data is not shared between channels.	Data is partially shared between channels.	There is full data integration.

Source: Adapted from Marmol and Fernandez (2019, Piotrowicz and Cuthbertson (2014, Beck and Rygl (2015, Mosquera et al. (2017, Verhoef et al. (2015, Rigby (2011

In this context, the first channel is a single channel which is a strategy in which customers, where there is only one channel (such as a physical store, only an online channel, must use only that channel to buy goods or services (Shi et al., 2020. Secondly, multi-channel is a marketing strategy where there are multiple channels such as a physical store, online, and mobile that customers can choose to purchase, and companies apply different strategies between channels (Lazaris & Vrechopoulos, 2014). There is no integration between channels. Third, cross-channel is expressed as partial channel integration and cross-channel synergy

(Zhang et al., 2010. Cross-channel, which emerged to provide a consistent experience to the customer through all channels, facilitates the data collection and decision-making process for the customer (Saghiri et al., 2017, p. 54. Contrary to multi-channel since there is partial integration between channels in cross-channel, the customer can trigger partial interaction, or the retailer can control the integration between channels (Beck & Rygl, 2015, p. 174. Finally, the omnichannel marketing approach, on the other hand, is the most up-to-date marketing approach, there is full integration between channels, and it aims to provide an uninterrupted customer experience (Brynjolfsson et al., 2013. Retailers can offer customers a seamless and uninterrupted customer experience whenever and wherever they want thanks to this new process.

2.2. Omnichannel Retailing

"Omni" is a Latin word that means "all" or "universal" and it was used first by Darrel Rigby in 2011 (Rigby, 2011. Omnichannel is therefore expressed as "all channels together" (Lazaris & Vrechopoulos, 2014. The omnichannel is an integrated sales experience that combines the advantages of physical stores with an information-rich online shopping experience (Rigby, 2011, pp. 18-19. Therefore, the requirement of at least two channels, which is a condition of multi-channel, is also valid in omnichannel marketing strategy, because omnichannel is an extended form of multi-channel (Piotrowicz & Cuthbertson, 2014. The omnichannel strategy offers customers the opportunity to move freely between online and offline channels within a single transaction process (Beck & Rygl, 2015 and provides a consistent experience, as all channels are integrated. By supporting offline channels with customer touch points such as kiosks and digital assistants, the omnichannel strategy combines the advantages of online channels like price comparison, and product information richness, and physical channels like experience, and instant access. Omnichannel retailing is defined as "a set of integrated processes and decisions that support an entire brand image in terms of a product purchase, return, and exchange, regardless of channel (such as in-store technologies, online, mobile, call center or social media" (Shi et al., 2020. The definition of omnichannel retailing emphasizes seamless experience throughout the customer journey.

Omnichannel customers, also called omni-shoppers are customers who use all channels simultaneously, are more knowledgeable, use technology better, and demand more from retailers than multi-channel or single-channel customers (Beck & Rygl, 2015; Lazaris & Vrechopoulos, 2014. The customer experience is at the forefront for omni-shoppers. Customer experience which includes all interactions that the customer will have with the company, directly or indirectly, is the internal and subjective response of the customer in her communication with the company (Meyer & Schwager, 2007. In addition, omni-shoppers demand convenience in their shopping processes. The omni-shoppers want to interact with the brand from all channels where they can shop, not from which channel to shop. Accordingly, retailers need to offer customers the same service experience from all channels to be able to meet the omni-shoppers' needs. Omni-shoppers demand from companies to

have a better experience throughout the customer journey (Mosquera et al., 2017. The customer journey is indivisible in omnichannel marketing strategy. Thus, the indivisibility of the customer journey brings about the necessity for retailers to adopt a holistic and integrated approach in their omnichannel marketing strategy.

The most emphasized trigger factors in the omnichannel strategy; are personalized experience (Shi et al., 2020; Tyrvinen et al., 2020, stock availability (Beck & Rygl, 2015; Willmott, 2014; Gensler et al., 2017, convenience (Chong, 2018; Mercier et al., 2014; Mosquera et al., 2017, price (Mosquera et al., 2017; Willmott, 2014, and brand perception. Therefore, these factors draw a general framework for revealing the omnichannel customer structure. Understanding the needs and wants of omnichannel customers is essential for retailers to implement their omnichannel strategy. Tailoring interactions to individual preferences and behaviors not only fosters customer loyalty but also enhances overall satisfaction. This personal touch in the omnichannel approach creates a seamless and engaging customer journey.

2.3. Customer Perception Dimensions in Omnichannel Marketing

It is essential for retailers to understand how customers perceive omnichannel marketing in an environment where they want to reach customers through all channels for providing maximum service experience. In this context, Shi et al. (2020) in their study measured omnichannel customer perception in 6 dimensions which are promotion, product and price information, transaction information, information access, order fulfillment, and customer service. Firstly, omnichannel promotion is when channels promote and support each other. Promoting another channel through one channel shows the customers that they can reach the company through all channels. Giving information about discounts and campaigns between channels also highlights an example of promotion. Secondly, omnichannel product-price information means that the products and prices offered through all sales channels are consistent. For example, all the products on the website can be found in the store, or all the products in the store can be found on the website. It is also expected that the price will be consistent across sales channels. Thirdly, big data databases are the basis of omnichannel transaction information. By creating big data, companies can offer personalized offers to customers. On the other hand, omnichannel access to information refers to the ability to access product, stock, or other information in another channel through one channel. Seeing the stock status of the stores on the website is an example. In addition, omnichannel order fulfillment is the shopping process that starts on one channel and continues on another channel. Finally, omnichannel customer service refers to the ability to receive customer service support through all channels.

2.4. Omnichannel Marketing Practices and Customer Behaviors

'Showrooming', 'webrooming, 'click and collect', and 'reserve online and collect in store' is omnichannel marketing practices and customer behavior. Firstly, showrooming is an omnichannel application where products are only experienced in the store, and

the purchase is completed through an online channel (Flavian et al., 2016; Piotrowicz & Cuthbertson, 2014). Secondly, webrooming is a strategy where customers can go to a physical store and research the product and its features in online channels before final evaluation and purchase. It provides advantages such as the instant availability of the product, availability of stock, and personal interaction with the store employees. Thirdly, click and collect is a strategy where the product is ordered from an online channel and then supplied from a physical store (Beck & Rygl, 2015). To contribute to the literature, different sub-applications of the 'click and collect' strategy have been determined, and a general table has been presented in this study (see Table 2). Buy online pick up in store (BOPS) application is the purchase of the product from the online channel and receiving it from a physical store after the product is researched online and then the stock status is checked in the physical store (Califano, 2019; Kim et al., 2017). In addition, click and reserve is the preservation of the product from the online channel and receiving it from a physical channel. On the other hand, click and collect from a delivery point, refers to the situation where the product can be reserved or purchased from the virtual online store and then received from the delivery points offered by the retailer to the customer (Beck & Rygl, 2015).

Table 2: Click and Collect Strategy Behaviors

Strategy	Definition	Sample
BOPS (Buy online pick up in-store)	It is a strategy where the product is purchased through an online channel and delivered from a physical store.	Marmol and Fernandez, 2019; Gök, 2022; Bell et al. 2014; Gao and Su 2016; Kim et al. 2017
Click and Reserve	The product is booked through the online channel and then picked up from the available store.	Hübner, et al. 2016
Click and collect from the delivery point	The product is reserved or purchased through the online channel and then available at the point of delivery.	Beck and Rygl, 2015

Source: Authors' elaboration

Finally, in-store marketing is expressed as 'in-store order, home delivery' (Mosquera et al., 2017). In-store technologies can be listed as follows: sensor technologies such as augmented reality, virtual mirrors (virtual dressing rooms), artificial intelligence, smart self-service kiosks, smart assistants, touch screens, QR code, RFID, near-field communication (NFC), Beacons appear as the internet of things (Mosquera et al., 2017, p. 176). In-store technologies are important for improving the customer experience (Juaneda-Ayensa et al., 2016).

2.5. The Purpose of the Research

While an omnichannel marketing strategy creates competitive power for retail companies around the world, companies in Türkiye have just started to implement it (Digital Deloitte & Tüsiad, 2019). In this direction, the study aims to discover the omnichannel applications of Türkiye's largest retailers and to reveal how they are applied within the retailing sector in Türkiye. With this study, omnichannel applications of Türkiye's top 100 retailing companies based on net sales figures were investigated. In this context, the scope of the research consists of retailers serving their customers through physical and online channels. The research questions to be answered in line with the purpose of the research are as follows.

RQ1: What is the prevalence of omnichannel marketing practices in the operations of Türkiye's largest retailers?

RQ2: In which sub-sectors are omnichannel marketing practices of Türkiye's largest retailers more common?

RQ3: What are the applications of omnichannel marketing implemented by Türkiye's largest retailers?

3. Methodology

In line to reveal the omnichannel applications of Türkiye's largest 100 retailers based on net sales figures, deductive content analysis, which is a qualitative research method, was applied (Hsieh & Shannon, 2005). It helps the researcher make specific definitions, identify examples, and create coding rules for each category. This approach aims to discover the frequency of word usage and its meaning. Thus, the deductive content analysis method was adopted in this study since this study involves selecting certain concepts for review and analysis, and then measuring and evaluating their presence on selected websites.

In general, the stages of content analysis are as follows: (1) determining the research question, (2) selecting the material, (3) creating the coding framework consisting of main categories and their sub-categories, (4) separating it into coding units, (5) testing the coding framework with dual coders, (6) discussing different coded statements in case of more than one coder, (7) evaluating the coding framework for consistency and validity and revising it accordingly, (8) recording of all the variables in its final form, and (9) finally presenting the information by making it

interpretable (Schreier 2012). In line with this process, the method of the research is given in Table 3.

The scope of the research consists of the 100 largest retailers in Türkiye, which Perapost Magazine and CRIF company list according to their net sales figures in the retail sector in Türkiye and published in the 2018/1 issue of Digital Age Magazine (Kutsal, 2018). Given that the research sought to examine the prevalence of omnichannel applications across the retail sector without specifying a particular sub-sector, the study was carried out with the 100 largest retailers. Digital Age and Perapost were determined as the source of the data of this research since Digital Age is a magazine that follows and reveals the developments in this field, and Perapost follows the developments in the field of retailing. Half of the 100 retailers are in the textile, ready-made clothing, and leather sectors (50%), while the other half are in food (24%), furniture and home improvement (14%), technology (6%), culture, art, and design (2%) and others (4%).

Table 3: Method of Research

Omnichannel Retailing in Türkiye: A Content Analysis Study
Method
STEP 1: Research Dataset
The first filter - the requirement for retailers to sell through stores, websites, and mobile applications - the question was applied based on the principle that the omnichannel provides the same service experience to the customer through all channels.
STEP 2: Creating the Coding Diagram
The variables to be coded were created with the deductive method of content analysis. Variables were determined under 6 dimensions that gave information about omnichannel applications obtained from the literature.
Deductive Content Analysis
STEP 3: Pilot Implementation
20% of the data set was coded independently by two coders.
STEP 4: Coding Process
The entire dataset was made by two independent encoders.
STEP 5: Data Collection Process, Reliability Analysis and Reconciliation
Data processing within the scope of the research was not carried out.
It is designed between two encoders.
STEP 6: Data analysis
The coded data were presented by reporting with descriptive analysis techniques.

In omnichannel retailing, a minimum of three channels is required for integration quality (Bielozorov, 2020). If any retailer uses three channels and there is an integration between channels, this retailer is accepted as using omnichannel applications. Examples of such integration include showrooming, webrooming, and click and collect. Therefore, firstly it was checked whether a retailer uses at least three channels or not. Then, the integration of these channels was checked with customer service representatives, and the website was reviewed to ensure that these channels were properly integrated. In this regard, the first screening criterion was applied that each firm should have at least three different channels which are website, store, and mobile. As a result of the elimination criteria applied to the population, it was found that 42 retailers use less than three channels. Thus, these 42 retailers were eliminated, and the data set decreased from 100 to 58.

Table 4: Dimensions Measuring Omnichannel Application

	Dimensions	Expressions
1	**Omnichannel Promotion**	The website has contact information for the store. The website has a mobile app icon. There are logos of social media applications on the website. There is a "come and buy from the store, cargo waiting application". The website provides information about store discounts.
2	**Omnichannel Product-Price Information**	All products available in the store are also available in the online store. Prices are the same between sales channels.
3	**Omnichannel Transaction Information**	There is a sign-up on the website.
4	**Omnichannel Information Access**	There is online shopping from the nearest store through the website. Store locations (addresses) are accessed on the website. Product stock status can be checked through kiosks in the physical store.
5	**Omnichannel Order Fulfillment**	There is a home delivery (address delivery) option. It has a click and collect application. There is a reserve - pick up from store application. The order is delivered within 24 hours. Discount coupons can be used on all channels
6	**Omnichannel Customer Service**	It has digital customer relations. A product purchased from the online store can be exchanged/returned from the store. For a product purchased from the store, support can be obtained from the online store via live chat.

In the second step, the deduction technique was used to determine the concepts to be coded. Since the coding scheme in the deductive content analysis should be created before the analysis, the model of the research was determined to measure omnichannel perception as 6-dimensional scale expressions which were developed by Shi et al. (2020) (see Table 4). In this direction, the relevant variables to be coded were determined. Thus, the first coding expressions under each dimension were created (see Table 4). For instance, if a website has a mobile app icon, it is possible to mention about omnichannel promotion dimension existence. Considering the table as a survey, each expression was asked to the customer service representative, and the website was reviewed. Ethical approval dated 16.04.2021 and numbered E-55578142-050.01.04-75123 was obtained from Akdeniz University.

In the third step, 20% of the data set was coded independently by two coders according to the expressions in Table 4. In the content analysis, the 'keyword search' method was also used in the website review (Neuendorf, 2001). Keywords are 'sign up', 'ship in 24 hours', and 'click and collect'. After the first coding, the results were discussed between the two coders, and the expressions to be considered in the coding list were revised to clarify if there was any misunderstanding in the expressions. In this context, revisions were made to the variables to be coded, the expressions were clarified, and the coding booklet consisting of 18 expressions was finalized (see Table 5). On the other hand, it was noticed during the first coding process that although retailers have different trademarks and are listed as different retailers in the coding booklet, they are located under one company. To illustrate, Migros Company has 4 different trademarks, which are Migros, Tansaş, Macrocenter, and Ramstore. Out of 4 different trademarks, only Migros was coded in the booklet due to the availability of the most information. Thus, one of the different trademarks under the same company was considered as a single firm in the booklet and the data set was reduced from 58 to 50.

In the fourth step, the entire dataset was made by two independent encoders. To ensure reliability between encoders in content analysis, there must be at least two coders (Neuendorf, 2001, p. 51). Therefore, a second encoder is required to do the coding.

In the fifth step, the data were collected by website review and interview technique. In cases where the website review was insufficient, interviews were held with the customer service representative. A total of 41 customer service representatives were interviewed. The customer service representative was given brief information about the purpose and scope of the study and was asked about information that was not included or could not be noticed on the website. These interviews were recorded with the permission of the customer service representative. Before the final version of the data was analyzed, the audio recordings were listened to and coded again.

Table 5: Final State of the Statements to be Codified

	Expressions
1	The website has contact information for the store.
2	The website has a mobile app icon.
3	There are logos of social media applications on the website.
4	The website provides information about store discounts.
5	All products available in the store are also available in the online store
6	All products on the website are available in the store.
7	Prices are the same between sales channels.
8	There is a sign-up on the website.
9	The stock information of the nearest store can be seen on the website.
10	Store locations are accessed from the website.
11	There is an address delivery option.
12	Orders can be placed from the call center.
13	There is a click and collect application.
14	The order is shipped within 24 hours.
15	The discount coupon can be used on all channels.
16	There is a digital customer relationship.
17	A product purchased from the online store can be exchanged/returned from the store.
18	There is a digital payment system.

In this study, the percentage of agreement, Scott's pi, and Cohen's kappa, which are commonly used in intercoder reliability methods analysis, were applied to the coded data (Neuendorf, 2001, p. 51). According to Scott's pi and Cohen's kappa values, the power of agreement does not fall below the medium level, but in general. there is a statistically significant level of agreement between the data coded independently by the two coders (see Table 6).

Table 6: Reliability Analysis Results

	Agreement Percentage	Scott's Pi	Cohen's Kappa	(p<0,05)	Number of Compromises (N)	Number of Non-compromises (N)	NN	N Decision
1	100%	1	1	.000	50	0	50	100
2	98%	0.959	0.958	.000	49	1	50	100
3	100%	1	1	.000	50	0	50	100
4	92%	0.839	0.839	.000	46	4	50	100
5	100%	1	1	.000	50	0	50	100
6	82%	0.653	0.640	.000	41	9	50	100
7	90%	0.800	0.794	.000	45	5	50	100
8	74%	0.435	0.431	.002	37	13	50	100
9	90%	0.806	0.801	.000	45	5	5	100
10	100%	1	1	.000	50	0	50	100
11	100%	1	1	.000	50	0	50	100
12	94%	0.822	0.806	.000	47	3	50	100
13	94%	0.878	0.878	.000	47	3	50	100
14	86%	0.691	0.685	.000	43	7	50	100
15	94%	0.788	0.766	.000	47	3	50	100
16	96%	0.901	0.896	.000	48	2	50	100
17	80%	0.595	0.597	.000	40	10	50	100
18	100%	1	1	.000	50	0	50	100

The condition of ensuring validity in content analysis depends on the compatibility between the aims and tools of the research. The definitions of the categories should be well explained and the features to be measured should be expressed based on the literature. In this direction, the categories are explained in detail in the section on the creation of the coding scheme based on the literature. On the other hand, the data obtained were reported in detail and supported by examples from the literature.

In the final step, the data were collected by website browsing and interview methods, and the collected data were analyzed with SPSS 23. Descriptive analysis techniques were used to summarize the data of the research and the percentage distribution of omnichannel applications was examined according to frequency analysis.

3.1. Analysis and Results

This study identified that 50 of the 100 largest retailers were on the path of omnichannel applications after the elimination criterion was applied. In other words, half of the retailers failed to switch to the omnichannel process.

Table 7: Implementation Rates of Omnichannel Applications by Sector

Dimensions	Expressions	Textile, Ready-made Clothing, and Leather		Food		Furniture and Home Improvement		Technology		Culture, Art, and Design		Total	
		n:28		n:13		n:5		n:2		n:2		n:50	
		n	%	n	%	n	%	n	%	n	%	n	%
Omnichannel Promotion	The website has contact information for the store.	27	54	13	26	5	10	2	4	2	4	49	98
	The website has a mobile app icon.	16	32	8	16	4	8	2	4	1	2	31	62
	There are logos of social media applications on the website.	28	56	10	20	5	10	2	4	2	4	47	94
	The website provides information about store discounts.	11	22	10	20	1	2	0	0	1	2	23	46
Omnichannel Transaction Information	There is a sign-up on the website.	28	56	12	24	5	10	2	4	2	4	49	98
Omnichannel Product-Price Information	All products available in the store are also available in the online store.	7	14	9	18	3	6	0	0	1	2	20	40
	All products on the website are available in the store.	6	12	11	22	2	4	0	0	0	0	19	38
	Prices are the same between sales channels.	7	14	6	12	2	4	0	0	1	2	16	32

Omnichannel Information Access	The stock information of the nearest store can be seen on the website.	14	28	7	14	3	6	2	4	0	0	26	52
	Store locations are accessed from the website.	27	54	13	26	5	10	2	4	2	4	49	98
	There is an address delivery option.	28	56	13	26	5	10	2	4	2	46	50	100
Omnichannel Order Fulfillment	Orders can be placed from the call center.	1	2	7	14	2	4	1	2	0	0	11	22
	There is a click and collect application.	12	24	6	12	2	4	2	4	0	0	22	44
	The order is shipped within 24 hours.	6	12	10	20	0	0	2	4	0	0	18	36
Omnichannel Customer Service	The discount coupon can be used on all channels.	1	2	4	8	2	4	1	2	1	2	9	18
	There is a digital customer relationship.	7	14	2	4	2	4	1	2	0	0	12	24
	A product purchased from the online store can be exchanged/ returned from the store.	22	44	4	8	2	4	1	2	0	0	29	58

Table 7 shows the frequency distribution of activities in six dimensions according to the sectors. The first dimension is related to the omnichannel promotion. The most frequently applied activity, with a rate of 98%, is being able to reach the store contact information on the website. The least preferred application is the store discounts on the website. On the other hand, according to the results of the statement asked within the scope of omnichannel transaction information, the second dimension is seen that 98% of the retailers' websites have the phrase "become a member".

According to the results of the research on the third dimension, which is expressed as omnichannel product-price information, the most preferred application is to have all the products available in the store at the same time in the online store. On the other hand, the least applied activity is to offer the same prices across all channels. Both applications are mostly seen in the textile, ready-made clothing, leather, and food sectors.

When the findings are evaluated within the scope of the fourth dimension, omnichannel information access, it can be concluded that there is information sharing between channels in general. Almost all retailers have store locations on the website. In addition, the stock status of the stores can be seen on 52% of the websites. This application is mostly seen in the textile, ready-made clothing, and leather sectors, while it is never applied in the culture, art, and design sectors due to its nature.

The findings regarding the fifth dimension, omnichannel order fulfillment, demonstrated that except for the "address delivery option", the applications under this dimension are not so common with low frequencies. For example, all 50 retailers in the data set apply the address delivery application. The second preferred application is click and collect strategy with a 44% application rate. Textile, ready-made clothing, and leather sectors constitute almost half of this rate. On the other hand, the least preferred application is the discount coupons that can be used in all channels. In addition, in the notifications received from the retailers, it was stated the reason that there could be a special campaign for a single channel to be able to attract the attention of the customer to that channel.

Finally, when the findings are examined within the scope of the omnichannel customer service dimension, the sixth dimension, it is seen that it has low application rates. For example, 22% of retailers' websites have a digital customer relationship service. This application is mostly applied in the textile, ready-made clothing, and leather sectors, with 14%. In the food sector, this practice is not common. On the other hand, 58% of retailers offer their customers an exchange or return service for a product they bought from the online store. This application is again seen in the textile, ready-made clothing, and leather sectors, with a maximum of 44%. It was considered sufficient to apply even one of the exchange or return options between channels during coding. Therefore, although the application is more than half, it has some limitations. For example, most retailers in this industry offer gift points for returns, and gift points are either online-only or store-only. On the other hand, most of the retailers stated that to keep the store stock status under control, only exchanges can be made from the store, and the return option is made online. The second constraint is the inability to make changes from each store. According to the information received from the customer service representative, for example, boutique products can only be returned or exchanged from boutique stores. Likewise, the channel to be exchanged or returned differs according to new-season products or old-season products. Although 8% is served in the food sector, it is not preferred much. In general, retailers in the food sector offer their customers the opportunity to call their customer service representative to create a complaint and return from the store instead of exchange.

Table 8: Omnichannel Applications of Türkiye's Largest Retailers

	Webrooming	Showrooming	Click and Collect
Textile, Ready-made Clothing, and Leather	%12	%14	%24
Food	%22	%18	%12
Furniture and Home Improvement	%4	%6	%4
Technology	0	0	%4
Culture, Art, and Design	0	%2	0
Total	%38	%40	%44

Table 8 presents the most common omnichannel applications by the largest retailers in Türkiye. The sector with the highest probability of webrooming practice is the food sector. Textile, ready-made clothing, and leather sectors come in second place. In the interviews with the customer service representatives of the retailers in this sector, it was stated that the sales channels are the same in terms of product variety, but they may not be in terms of stock. The furniture, and home improvement industry ranks 3rd. Pondering the product diversity in this sector, it is likely to have a lower percentage than the food and textile, ready-made clothing, and leather sectors. It is possible to say that it is also common in the technology sector. It can be said that while the furniture and home improvement industry has the lowest rate, it is not in the culture, art, and design sectors in line with the data set included in the research. The practice of showrooming is mostly seen in the food sector. Retailers in this sector push their customers to practice this behavior by applying special discounts to the website. In the culture, art, and design sectors, the rate of finding the products in the online store is 2%. Another omnichannel application most used in the retail industry is the click and collect strategy. According to the results of the research, it is seen that this application is mostly applied in the textile, ready-made clothing, and leather sectors.

4. Discussion

When the results are evaluated, it can be concluded that there is a transition from multi-channel retailing to omnichannel retailing in Türkiye, similar to other retailers around the world (PwC, 2017; Verhoef et al., 2015). According to the results of the research, omnichannel strategies, which are seen to be most applied in Türkiye's largest retailers, are found in showrooming, webrooming, and click and collect as in the world literature (Yetkin Özbük et al., 2020). They are most common in the food and textile, ready-made clothing, and leather sectors. Studies around the world support this result by finding the most applications in the textile sector (Lynch & Barnes, 2020; Mainardes et al., 2019). On the other hand, it has also been revealed in studies that retailers cannot fully meet the needs of omni-shoppers (Hoogveld & Koster, 2016). As in Türkiye, many retailers still manage channels in a silo manner (Shi et al., 2020).

According to the results of the research on the first dimension expressed as omnichannel promotion, retailers help the customer to perceive the brand, not the channel, by promoting other channels among the channels. In accordance with the present results, previous studies have demonstrated that providing goods and services consistently through all channels increases channel transparency and, thus, the customer's trust in the brand (Shen et al., 2018; Xie et al., 2023).

When the retail sector is evaluated within the scope of the omnichannel transaction information dimension, it is possible to say that retailers are successful in this regard. This concept is important for retailers to track the customer journey (Mansurali et al., 2024). Retailers can follow the customer journey of their member customers and generate big data. Therefore, customers can find the opportunity to get personalized offers for their future purchases based on their past purchases. It is known in the literature that customers who receive a personalized service experience buy products more frequently and spend more money (Ansari & Mela, 2003).

The study determined that retailers were not successful in terms of omnichannel product and price information. As supported in the literature the biggest challenge retailers face in the multi-channel transition process is the management of supply chains and channel integration (Cao & Li, 2015; Gallino & Moreno, 2014). In addition, retailers presenting price inconsistencies or product differences between channels can make the customer uneasy during the shopping process (Kazancoglu & Aydin, 2018). This accords with the findings of the current research, which was obtained from the interviews with the customer service representatives. They mentioned that the payment points differ, especially with the pandemic period. Therefore, it is important to focus on this dimension for retailers.

In addition, retailers are successfully applying the activities within the scope of the omnichannel information access dimension. Omni-shoppers need to have access to information through all channels so that they can have an uninterrupted experience.

According to the results of the research regarding omnichannel order fulfillment, during the interviews with the customer service representative, it was learned that the click and collect application was implemented in limited regions. Although retailers have started to implement click and collect applications, they can only be implemented in pilot regions due to reasons such as supply chain and transportation network. It was stated that it is difficult to follow the stock of the store, especially in the click and collect application. In the interviews with some retailers, it was noted that the stores did not want the click and collect strategy. For this reason, it has been observed that it is managed in a silo manner and a multi-channel marketing strategy is implemented (Joseph, 2015 as cited in Shi et al., 2020).

Finally, when the retail sector is evaluated within the scope of omnichannel customer service, the prevalence of digital customer relations applications has turned out to be extremely low. Failure to return or exchange between channels is considered a multi-channel marketing strategy (Marmol & Fernandez, 2019). Therefore, when evaluated in terms of omnichannel customer relations, it can be seen that there is an awareness and tendency, but multi-channel understanding prevails.

5. Conclusion and Further Areas of Research

Today's customers want to reach retailers through all channels, to be able to compare products or prices with a single click, and to have a consistent experience through all channels of the brand. In this direction, the understanding of marketing is shaped in line with customer behavior. With the omnichannel strategy, retailers can meet the demands of today's customers. Retailers have to implement the omnichannel strategy in the face of omnichannel customers who constantly demand a better experience. Retailers must adopt the omnichannel strategy in this direction.

To successfully implement the omnichannel strategy, retailers need to create big data, integrate data on all channels, and create a good supply chain. When these are implemented successfully, the customer will perceive the brand directly, not the sales channels, and the retailer will be able to provide a smooth customer experience.

In this direction, because of the elimination criteria determined based on the definition of omnichannel, it has been revealed that 50 of the 100 largest retailers in Türkiye prefer omnichannel applications. Therefore, it is obvious that the prevalence of using omnichannel applications by Türkiye's largest retailers is close to 50%. When the findings of the research were examined, it was revealed that retailers with good supply chain management and technological infrastructure showed omnichannel applications. Because the dynamic structure of the market and technology complicates the work of omnichannel practitioners. The omnichannel strategy is technology-driven. With technologies such as the Internet of Things, Beacon, RFID, smart carts, kiosks, digital payment systems, artificial intelligence, and near-field communication, it is necessary to provide service to the customer. According to the research findings, although retailers are using these technologies, especially in the textile, ready-made clothing, and leather sectors, their application areas are limited. Türkiye is not yet at the desired level in payment transactions with digital wallets and near-field communication methods (Digital Deloitte & Tüsiad, 2019).

It is seen that the retailers in Türkiye apply the most mentioned omnichannel practices in the world literature, such as click and collect, mentioned in the omnichannel order fulfillment dimension, finding all the products on the website in the store, and finding all the products in the store on the website. Although the application rates are low, it is understood that there is an awareness and tendency. The reason why retailers can apply the subject applications in limited regions is the lack of supply chain management and the inadequacy of the transportation network.

When the findings are examined in general terms, it is seen that no retailer can successfully implement omnichannel applications. As a result of the research, it has emerged that the stores of retailers in the textile, ready-made clothing, and leather sectors are managed in a silo manner in terms of prices and campaigns. For this reason, although there are retailers that serve their customers through more than one sales channel service, it is obvious that there are major deficiencies in integration, supply chain management, omnichannel price-product information, omnichannel customer service, omnichannel transaction information, and access to omnichannel information. It is seen that there is a general awareness and practice for the 'click and collect' strategy, which is evaluated under the omnichannel order dimension. At this point, we encounter differences in the way of implementation. Many retailers stated that this practice applies to limited regions. The reason for this is stated as the lack of supply chain management. Therefore, omnichannel applications are seen in the retail sector in Türkiye, but the multi-channel approach is still dominant. There is a transition from multi-channel to omnichannel.

5.1. Managerial Implication

The findings show that the retailers in the Türkiye lack of consistency in presenting prices across different channels or product differences between channels. Thus, the retailers should deliver a seamless customer experience across all channels, necessitating retailers to maintain uniformity in presenting products and prices. On the other hand, the study's findings reveal a lack of cross-channel returns and exchanges. Therefore, retailers should increase returns and exchanges across channels to enhance the customer service experience.

Retailers must also offer a personalized service experience to capture customers' attention. For example, by issuing gift coupons for shopping, they can encourage the next shopping (Shi et al., 2020). On the other hand, these are short-term solutions. Retailers must successfully implement the omnichannel strategy and ensure that the customer perceives the brand, not the channel. To do this, data integration, understanding customer behavior, channel evaluation, distribution of resources among channels, and coordination of channel strategies are the most important factors that retailers should pay attention to (Neslin et al., 2006). They must also deliver a uniform and consistent service experience to the customer across all channels. It is especially important for retailers to present products and prices consistently through all channels. In this context, they should think long-term, not short-term. Taking account of how important mobile applications are in our lives with the COVID-19 epidemic (Kim et al. 2020), retailers should increase their mobile application activities. In this direction, retailers should also have a trained personnel structure. On the other hand, retailers should increase their delivery options and include the customer in the process by offering a choice about delivery. In addition, it is imperative to exercise caution when it comes to the potential drawbacks of technology in the realm of omnichannel retailing. While technology does afford retailers the ability to provide their customers with personalized service, there are

also concerns regarding the safeguarding of customer privacy (Thaichon et al., 2024). Therefore, it is crucial for retailers to place transparency and the cultivation of trust with their customers at the forefront of their priorities.

In general, companies should aim to create a better customer experience by focusing on supply chain, data analytics, digital marketing, and digital customer relations (Digital Deloitte & Tüsiad, 2019). Supply chain management requires good technological infrastructure. Instead of establishing this technological infrastructure in the first place, retailers can get support from companies that manage it and develop the process.

5.2. Limitations and Future Research

Reflecting upon the dynamic structure of websites and the fact that retailers develop themselves, the results may differ in longer and in-depth interviews. Future studies can conduct research on omnichannel applications by collecting data over a longer period and with a larger data set. Secondly, in the interviews with the customer service representative, it was reported that the payment points differ especially with the pandemic period. Omnichannel applications differ depending on whether the payment is made at the store, door delivery, or online store. In this direction, research on payment in omnichannel applications should be conducted in future studies. On the other hand, examining omnichannel activities during peak shopping conditions such as Black Friday can also be considered. Finally, future studies should include an equal number of retailers from each sector in the dataset, in-depth interviews should be conducted, and research should be conducted on the difficulties experienced by retailers in the transition to the omnichannel.

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